# Meat Was the Strongest Perimeter Department in June 2025

# By: Anne-Marie Roerink, President, 210 Analytics LLC

**June Review**

* After plateauing in May, consumer sentiment improved in June 2025, according to the University of Michigan. The index increased to 60.7 points from 52.2 points in May. The improvement was seen across numerous facets of the economy, with expectations for personal finances and business conditions climbing about 20% or more. Despite June’s gains, sentiment remains about 18% below December 2024.
* Several publicly-traded retail and foodservice companies added language on tariffs in the risk sections of their annual and quarterly reporting. Consumer sentiment relative to tariffs held steady in May after support fell for several months over concerns regarding their potential impact on prices, product availability and employment.
* The Consumer Price Index rose 2.4% year-over-year in May, according to federal data, mostly unchanged from April. Consumer food costs increased 2.9%, including 3.8% for restaurants. Already starting a higher price point, the above-average increases for foodservice means a continued retail-centric meal landscape for most consumers.
* Combined with the nation’s focus on protein, this has led to a very strong first half of 2025 for the meat department. Led by beef and chicken, most proteins have gained during the first six months of the year. In the weeks through June 29th, the meat department generated upwards of $54 billion, up 7.1% in dollars and 2.8% in pounds.
* This increase is supported by 98.2% of households purchasing meat/poultry at least once. The average spend per household is up 6.9%, reaching $426 during the first half of the year. Units per trips are down 1.5% as consumers are mixing in larger pack sizes to save over time. They are also shopping for meat/poultry more frequently. The average household has already purchased meat 26 times, up 5.3% versus the first half of 2024.

**Inflation Insights**

In June 2025 (the four weeks ending 6/29/2025), the price per unit across all foods and beverages in the Circana MULO+ universe stood at $4.34. This reflects an increase of 2.6% over June 2024.

* Center-store prices averaged $4.09, an increase of 2.5% over June 2024.
* Fresh food prices averaged $4.27, which was an increase of 3.4% year-over-year. Eggs continued to have a substantial impact on the overall fresh perimeter and total store price points. On a per unit basis, eggs averaged $5.54, which was down from $6.33 in May, but reflects an increase of 29.5% versus June 2024.

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Food & beverages | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | Q2 2024 | Q3 2024 | Q4 2024 | Q1 2025 | Q2 2025 | June 2025 |
| PPU | $3.13 | $3.31 | $3.49 | $3.93 | $4.17 | $4.24 | $4.24 | $4.24 | $4.30 | $4.30 | $4.36 | $4.34 |
| Change | +2.0% | +5.7% | +5.5% | +12.5% | +6.1% | +1.7% | +1.5% | +1.9% | +2.2% | +2.9% | +2.7% | +2.6% |

Source: Circana, Integrated Fresh, Total U.S., MULO+

Inflation across a number of proteins led to an overall increase of 4.0% for meat and poultry prices in June. Fresh meat prices increased far more than processed meat and poultry prices. Despite inflation, consumers have purchased far more meat and poultry. Today’s meat department volume level is only surpassed by the 2020 pandemic year volume.

|  |  |  |  |
| --- | --- | --- | --- |
| Price inflation (price/volume) | Price/volume | Change vs. YA | Change vs.3YA |
| Total meat (FW and RW) June 2025 | $4.93 | +4.0% | +7.2% |
| Total meat latest 52 weeks | **$4.67** | **+3.3%** | **+8.1%** |
| Fresh meat June 2025 | $4.84 | +5.1% | +10.1% |
| Fresh meat latest 52 weeks | **$4.56** | **+4.5%** | **+9.8%** |
| Processed meat June 2025 | $5.16 | +1.7% | +1.7% |
| Processed meat latest 52 weeks | **$4.98** | **+1.1%** | **+5.2%** |

Source: Circana, Integrated Fresh, Total US, MULO+

Inflation is no longer driven by beef alone. While lamb and beef price increases led in June 2025, chicken and turkey prices also rose. On the processed meat side, several proteins gained, led by frankfurters and processed chicken.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| June 2025 | Price/lbs | Change vs. YA | Latest 52 weeks | Price/lbs | Change vs. YA |
| Fresh beef | $7.30 | +6.7% | Fresh beef | $6.92 | +5.5% |
| Fresh chicken | $3.20 | +4.8% | Fresh chicken | $3.13 | +2.7% |
| Fresh pork | $3.21 | -1.5% | Fresh pork | $3.21 | +1.5% |
| Fresh turkey | $4.44 | +6.2% | Fresh turkey | $2.62 | -2.0% |
| Fresh lamb | $8.74 | +7.1% | Fresh lamb | $8.16 | -0.2% |
| Fresh exotic | $9.83 | -2.3% | Fresh exotic | $8.46 | -2.1% |
| Bacon | $6.27 | +1.6% | Bacon | $6.19 | +1.5% |
| Packaged lunchmeat | $5.89 | -0.1% | Packaged lunchmeat | $5.97 | +1.3% |
| Dinner sausage | $4.42 | +1.6% | Dinner sausage | $4.47 | +0.2% |
| Frankfurters | $3.81 | +4.9% | Frankfurters | $3.69 | +3.4% |
| Breakfast sausage | $4.96 | 0.0% | Breakfast sausage | $4.79 | +2.4% |
| Smoked ham | $3.92 | +2.3% | Smoked ham | $2.89 | +1.3% |
| Processed chicken | $6.77 | \_+3.1% | Processed chicken | $6.44 | -0.2% |

Source: Circana, Integrated Fresh, Total US, MULO+

**Meat Sales**

The four-week month of June generated nearly $8.6 billion in meat department sales. This reflects the inflation mentioned above on top of demand-driven growth. Pound sales increased 1.7% in June 2025. The increase was fully driven by fresh meat sales that increased 3.0% in June while processed meat sales were down a bit.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | June 2025 | | | | | Latest 52 weeks | | | |
|  | Dollar  size | Dollars  vs. YA | Dollars   vs. 2YA | lbs  vs. YA | lbs vs. 2YA | Dollars  vs. YA | Dollars   vs. 2YA | lbs  vs. YA | lbs vs. 2YA |
| Total meat department | **$8.6B** | **+5.8%** | **+9.3%** | **+1.7%** | **+2.0%** | **+6.5%** | **+9.0%** | **+3.0%** | **+3.9%** |
| Fresh meat | $6.1B | +8.3% | +13.3% | +3.0% | +4.0% | +8.9% | +13.6% | +4.2% | +5.9% |
| Processed meat | $2.5B | +0.1% | +0.7% | -1.5% | -2.9% | +1.1% | -0.6% | 0.0% | -0.9% |

Source: Circana, Integrated Fresh, Total US, MULO+

Meat department sales have been positive since the first quarter of 2024.Second-quarter sales gains reached their highest levels since 2020, at +7.3%. Volume gains also reached the highest level since 2020, though it’s important to remember the switch in Easter timing that moved holiday-related sales from the first to the second quarter.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Dollars | $ vs. YA | Lbs vs. YA |
| June 2025 | **$8.6B** | **+5.8%** | **+1.7%** |
| w.e. 06-08-25 | $2.2B | +5.7% | +1.9% |
| w.e. 06-15-25 | $2.2B | +6.6% | +2.8% |
| w.e. 06-22-25 | $2.1B | +7.7% | +3.6% |
| w.e. 06-29-25 | $2.1B | +3.2% | -1.4% |

Growth would have likely been even stronger if it hadn’t been for the final week of June, ending 6/29. This is the week leading up to Independence Day. With the holiday falling on a Friday this year, it is likely that more of the sales were pushed into the first week of July with the Circana week endings falling on Sundays. This will likely bode well for the July report.

**Assortment**

After a slight reduction in assortment in the first quarter of 2025, assortment is holding stable at around 456 the past few months.

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Average meat department items per store selling for … | | | | | | | | | | | | | | | | | | | | |
|  | **2019** | | **2020** | **2021** | | | **2022** | | **2023** | **Q2 24** | | | **Q3 24** | | **Q4 24** | | **Q1 25** | | **Q2 25** | **June 25** | |
| Total meat | 478 | 448 | | | 448 | 439 | | 434 | | | 428 | 424 | | 455 | | 450 | | 456 | | | 458 |
| Change vs. YA | -- | -6.2% | | | -0.0% | -2.1% | | -1.0% | | | -2.0% | -1.0% | | -0.3% | | -0.4% | | +0.7% | | | +0.5% |

Source: Circana, Integrated Fresh, Total US, MULO+, average items per store selling

Fresh Meat Sales by Protein

Beef generated more than half of all fresh meat sales with dollars up by double digits. This includes robust price increases but also 3.5% growth in volume sales. Pork and lamb also had a strong June.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| June 2025 | | | | | |  | Latest 52 weeks | | |
| Type | $ sales | $ vs. YA | | Lbs vs. YA | Type | | $ sales | $ vs. YA | Lbs vs. YA |
| Total fresh meat | $6.1B | | +8.3% | +3.0% | Total fresh meat | | $76.6B | +8.9% | +4.2% |
| Fresh beef | $3.5M | | +10.4% | +3.5% | Fresh beef | | $42.8B | +12.5% | +6.6% |
| Fresh chicken | $1.6M | | +7.6% | +2.6% | Fresh chicken | | $20.2B | +6.1% | +3.3% |
| Fresh pork | $702M | | +2.1% | +3.7% | Fresh pork | | $8.6B | +4.0% | +2.5% |
| Fresh turkey | $181M | | +3.8% | -2.3% | Fresh turkey | | $3.3B | -0.2% | +1.8% |
| Fresh lamb | $74M | | +18.1% | +10.3% | Fresh lamb | | $957M | +10.9% | +11.2% |
| Fresh exotic | $15M | | -9.0% | -6.8% | Fresh exotic | | $219M | -2.2% | -0.2% |
| Veal | $3.1M | | +0.5% | -6.4% | Veal | | $44M | -2.0% | -5.5% |

Source: Circana, Integrated Fresh, MULO+

**Processed Meat**

Processed meat sales were a mix in June. Packaged lunchmeat, smoked ham and frankfurters pulled down the total category performance, whereas bacon, breakfast sausage and processed chicken grew. Processed meat and poultry has also seen a lot of growth in the frozen food department.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | June 2025 | | |  | | | Latest 52 weeks | | |
| Type | **$ sales** | **$ vs. YA** | **Lbs vs. YA** | | **Type** | **$ sales** | | **$ vs. YA** | **Lbs vs. YA** |
| Processed meat | **$2.5B** | **+0.1%** | **-1.5%** | | **Processed meat** | **$31.8B** | | **+1.1%** | **0.0%** |
| Packaged lunchmeat | $565M | -2.4% | -2.3% | | Bacon | $7.0B | | +4.3% | +2.7% |
| Bacon | $535M | +2.5% | +0.9% | | Packaged lunchmeat | $7.0B | | -1.3% | -2.5% |
| Dinner sausage | $481M | +1.3% | -0.2% | | Dinner sausage | $5.7B | | +3.7% | +3.4% |
| Frankfurters | $322M | -1.4% | -6.0% | | Frankfurters | $3.2B | | +2.2% | -1.1% |
| Breakfast sausage | $174M | +3.1% | +3.1% | | Breakfast sausage | $2.5B | | +4.6% | +2.2% |
| Processed chicken | $61M | +4.5% | +1.3% | | Smoked ham | $1.9B | | +0.4% | -0.9% |
| Smoked ham | $60M | -6.3% | -8.4% | | Processed chicken | $785M | | +7.0% | +7.2% |

Source: Circana, Integrated Fresh, Total US, MULO+

**Grinds**Ground beef generated $1.4 billion out of the total $ billion across all beef cuts in June. Dollar sales for ground beef rose by double digits and pound sales increased 4.6%. Turkey was the only ground meat that did not have a good June.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | June 2025 | | | | |  | Latest 52 weeks | | |
| Type | **$ sales** | **$ vs. YA** | | **Lbs vs. YA** | **Type** | | **$ sales** | **$ vs. YA** | **Lbs vs. YA** |
| Ground beef | $1.4B | | +13.0% | +4.6% | Ground beef | | $16.4B | +12.2% | +5.2% |
| Ground turkey | $149M | | +5.3% | -2.6% | Ground turkey | | $2.0B | +4.6% | +4.2% |
| Ground chicken | $31M | | +29.1% | +30.3% | Ground chicken | | $365M | +15.5% | +15.7% |
| Ground pork | $15M | | +2.6% | +7.0% | Ground pork | | $227M | +0.2% | +2.8% |
| Ground lamb | $3.8M | | +14.1% | +7.3% | Ground lamb | | $57M | +12.7% | +11.3% |
| Ground veal | $0.7M | | +8.2% | +5.0% | Ground veal | | $10M | +2.8% | -0.5% |

Source: Circana, Integrated Fresh, Total US, MULO+

**What’s Next?**

* According to the Circana survey of primary grocery shoppers, consumers are expecting summer travel to be fairly similar to last year's. If consumers choose to travel less (about one in 10) they cite travel costs and financial pressure in general as the main reasons.
* Consumers also expect summer cooking patterns to be similar to last year’s, hosting family and friends and doing cookouts several times during the 13 weeks between Memorial and Labor Day. One-third say new foods and recipes may prompt additional grilling occasions.
* Seven in 10 households who grill at least once during the summer tend to prepare their own meat/seafood items, whereas 17% buy grill-ready items. Consumers are slightly more likely to purchase pre-made sides, at 25%.
* These are big opportunities for the meat department, especially with focused grilling ads and merchandising that integrate other departments such as bakery and produce.

## **Deli Meat Sales Pull Down Strong June Results for Cheese, Entertaining and Deli-Prepared Foods**

## **Deli Sales**

In June, year-over-year unit sales growth was highest for deli entertaining influenced by Father’s Day sales. However, deli prepared easily remained the largest seller, at $2.5 billion, with the third-highest rate of growth, at +1.1% in units.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | June 2025 | | | | |  | Latest 52 weeks | | |
|  | **$ sales** | **$ vs. YA** | | **Units vs. YA** |  | | **$ sales** | **$ vs. YA** | **Units vs. YA** |
| Department deli | **$4.5B** | | **+1.1%** | **+0.4%** | **Department deli** | | **$56.8B** | **+2.6%** | **+2.3%** |
| Deli cheese | $764M | | +4.6% | +2.3% | Deli cheese | | $9.8B | +3.7% | +2.4% |
| Deli entertaining | $513M | | +2.9% | +3.1% | Deli entertaining | | $6.5B | +5.0% | +5.4% |
| Deli meat | $678M | | -7.5% | -6.8% | Deli meat | | $8.4B | -8.3% | -6.7% |
| Deli prepared | $2.5B | | +2.2% | +1.1% | Deli prepared | | $32.2B | +5.0% | +4.1% |

Source: Circana, Total US, Integrated Fresh, MULO+, % growth versus year ago

**Deli Meat**

Deli meat sales continued to struggle in June. Even pre-sliced, which had been an area of growth, fell short of last June’s dollar and pound sales levels.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | June 2025 | | | | |  | Latest 52 weeks | | |
| Deli meat | **$ sales** | **$ vs. YA** | | **Lbs vs. YA** |  | | **$ sales** | **$ vs. YA** | **Lbs vs. YA** |
| Total deli meat | **$678M** | | **-7.5%** | **-7.7%** | **Deli meat** | | **$8.4B** | **-8.3%** | **-6.7%** |
| Grab & go | $209M | | -5.2% | -3.9% | Grab & go | | $2.5B | -6.1% | -4.4% |
| Pre-sliced | $126M | | -1.3% | -1.5% | Pre-sliced | | $1.7B | +2.4% | +5.2% |
| Service | $343M | | -10.9% | -11.5% | Service | | $4.2B | -13.0% | -11.3% |

Source: Circana, Total US, MULO+, Integrated Fresh % growth versus year ago

Packaged lunchmeat (included in meat department sales) generated $565 million in June. Pound sales were down year-on-year but less than deli meat. Additionally, the calendar year results were also in far better shape.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Pre-packaged | June 2025 | | | |  | Latest 52 weeks | | |
| lunchmeat | **$ sales** | **$ vs. YA** | **Lbs vs. YA** |  | | **$ sales** | **$ vs. YA** | **Lbs vs. YA** |
| Packaged lunchmeat | $565M | -2.4% | -2.3% | Packaged lunchmeat | | $7.0B | -1.3% | -2.5% |

Source: Circana, Total US, MULO+, Integrated Fresh % growth versus year ago

**Deli Cheese**

Contrary to deli meat, deli cheese had a strong June. Pre-sliced and specialty cheese grew dollar and pound sales, whereas grab & go and service cheese were unable to keep up with last year’s levels. Specialty cheese sales have done well all year, with the 52-week pound sales up 7.5%.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | June 2025 | | | | |  | Latest 52 weeks | | |
| Deli cheese | **$ sales** | **$ vs. YA** | | **Lbs vs. YA** |  | | **$ sales** | **$ vs. YA** | **Lbs vs. YA** |
| Total deli cheese | **$764M** | | **+4.6%** | **+3.9%** | **Deli cheese** | | **$9.8B** | **+3.7%** | **+4.1%** |
| Grab & go | $94M | | -1.6% | -2.9% | Grab & go | | $1.2B | -0.7% | -0.2% |
| Pre-sliced | $59M | | +6.9% | +6.1% | Pre-sliced | | $725M | +1.1% | -0.3% |
| Service | $82M | | -3.7% | -4.9% | Service | | $1.0B | -7.5% | -6.5% |
| Specialty | $522M | | +7.2% | +6.7% | Specialty | | $6.8B | +6.9% | +7.5% |

Source: Circana, Total US, MULO+, Integrated Fresh

**Deli Entertaining**

The categories in deli entertaining had a very mixed performance in June. Whereas trays show large gains, growth for dips/sauces and spreads was flat and down. This pattern repeats in the 52-week view.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | June 2025 | | | | |  | Latest 52 weeks | | |
| Deli entertaining | **$ sales** | **$ vs. YA** | | **Lbs vs. YA** |  | | **$ sales** | **$ vs. YA** | **Lbs vs. YA** |
| Deli entertaining | **$513M** | | **+2.9%** | **0.0%** | **Deli entertaining** | | **$6.5B** | **+5.0%** | **+3.3%** |
| Dips and sauces | $269M | | +2.8% | -0.5% | Dips and sauces | | $3.3B | +3.6% | +1.2% |
| Trays | $93M | | +6.7% | +9.2% | Trays | | $1.2B | +8.5% | +9.0% |
| Spreads | $84M | | -1.9% | -3.2% | Spreads | | $1.1B | -1.1% | -3.2% |
| Pickles/relish | $67M | | +4.8% | +1.1% | Pickles/relish | | $813M | +15.6% | +14.5% |

Source: Circana, Total US, MULO+, Integrated Fresh, % increase versus same period year ago, deli prepared foods including both fixed and random weight, includes known deli products

**Deli Prepared**

While sales for retail deli-prepared foods and meals grew year-over-year in June, the rate of growth was far below that of the full year. In a change from an otherwise strong year, prepared meats lost ground in June, much like pizza and combination meals. Contrary to lettuce and salad in the produce department, ready-to-eat salads in the deli department showed strong growth in dollars and units.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | June 2025 | | | |  | Latest 52 weeks | | |
| Deli prepared | **$ sales** | **$ vs. YA** | | **Units vs. YA** |  | **$ sales** | **$ vs. YA** | **Units vs. YA** |
| Deli prepared | **$2.5B** | | **+2.2%** | **+1.1%** | **Deli prepared** | **$32.2B** | **+5.0%** | **+4.1%** |
| Entrees | $683M | | +4.7% | +3.5% | Entrees | $8.7B | +5.1% | +3.7% |
| Prepared meats | $482M | | -1.1% | -2.0% | Prepared meats | $6.4B | +5.6% | +6.8% |
| Salads | $479M | | +3.8% | +4.0% | Salads | $5.3B | +6.9% | +7.4% |
| Sandwiches | $318M | | -0.9% | -3.4% | Sandwiches | $3.8B | +2.0% | -2.2% |
| Appetizers | $168M | | +7.7% | +5.8% | Side dishes | $2.2B | +4.5% | +4.0% |
| Side dishes | $157M | | +2.7% | +3.0% | Appetizers | $2.2B | +6.3% | +4.6% |
| Pizza | $87M | | -1.3% | -3.7% | Soups & chili | $1.4B | +7.1% | +5.3% |
| Soups & chili | $62M | | +8.4% | +5.6% | Pizza | $1.2B | +5.2% | +2.5% |
| Breakfast | $41M | | -8.5% | -8.9% | Breakfast | $567M | 0.0% | -5.0% |
| Combo meals | $16M | | -3.0% | -2.3% | Combo meals | $206M | +3.4% | +4.3% |
| Desserts | $7.0M | | -12.9% | -12.3% | Desserts | $90M | -12.0% | -13.1% |

Source: Circana, Total US, MULO+, Integrated Fresh, % increase versus same period year ago, deli prepared foods including both fixed and random weight.

**Date ranges:**

2024: 52 weeks ending 12/29/2024

Q1 2025: 13 weeks ending 3/30/2025

June 2025: 4 weeks ending 6/29/2025